Group Owners Guide
**Mendeley Institutional Edition Group Owner Guide**

As a Mendeley Institutional Edition (MIE) group owner, you would be responsible for managing group members, maintaining the holding list and also maintaining OpenURL resolver endpoints. Additionally, you, along with other group administrators, will have access to the analytics data of the group.

*Note: all functionalities mentioned in this guide have been tested on most modern browsers including Google Chrome, Mozilla Firefox and Microsoft Internet Explorer version 8 and above.*
<table>
<thead>
<tr>
<th>Contents</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mendeley Institutional Edition Group Owner Guide</td>
<td>3</td>
</tr>
<tr>
<td>Glossary of Terms</td>
<td>5</td>
</tr>
<tr>
<td>Overview</td>
<td>7</td>
</tr>
<tr>
<td>Editing Group Details</td>
<td>8</td>
</tr>
<tr>
<td>Inviting Members</td>
<td>9</td>
</tr>
<tr>
<td>Promoting Member to Group Admin</td>
<td>12</td>
</tr>
<tr>
<td>Promoting Admin to Group Owner</td>
<td>12</td>
</tr>
<tr>
<td>Removing Group Members</td>
<td>13</td>
</tr>
<tr>
<td>Uploading Journal Holdings</td>
<td>14</td>
</tr>
<tr>
<td>Adding OpenURL Resolver Endpoints</td>
<td>15</td>
</tr>
<tr>
<td>Viewing Analytics</td>
<td>16</td>
</tr>
<tr>
<td>Comparing Journals</td>
<td>18</td>
</tr>
</tbody>
</table>
Glossary of Terms

A-Z list
The complete list of journals to which a library subscribes. The list can be uploaded to an institutional group for comparison with aggregated readership data from amongst the group’s members. Also referred to as ‘Holdings.’

Citation styles
Citation generation / management is one of the main features of the Mendeley desktop application. Mendeley supports a huge number of citation styles (2,600 as of summer 2012). The selection is based on a well-known public repository and is updated on a regular basis.

COUNTER stat
This is an industry standard for measuring the number of downloads to an institution that a journal has had from a publisher Web site. Mendeley stats are not related to COUNTER statistics.

Discipline
When a user joins Mendeley we ask them to indicate in which academic discipline (and sub-discipline) they do research/study. We provide a drop-down list to choose from, which is based on WorldCat categories. There are 25 categories for main academic discipline, ranging from social sciences like Arts & Literature to hard sciences like Medicine. The Mendeley Institutional Edition uses these self-assigned disciplines for data dashboard breakdowns.

Document
In Mendeley we count metadata records as documents. It is important to draw a distinction between user documents and unique documents (canonical documents). When a user adds a user document to their library, it remains tied to that user, and the user is free to alter the metadata details. However, in the background, Mendeley constantly analyses all user documents and cluster similar entries to create unique documents. It is via this process that Mendeley computes and aggregates readership statistics for single articles.

Holdings
See ‘A-Z list.’

Impact
Traditionally, impact is measured by citation counts. The more the publications of an institution are cited in other publications, preferably by researchers from other institutions, the more important these publications are and the more important the institution is. Mendeley has come up with an alternative impact measurement which is based on article readership within the Mendeley user base. Studies have shown that this is a more responsive alternative to the traditional citation-based measurement.

Member
An individual who has signed up to the Mendeley network. This can be a student, professor or researcher. Furthermore a Mendeley member can join a group (including institutional group) within Mendeley to become a group member of a particular group. See ‘User.’

Mendeley
The company behind the Mendeley products. See www.mendeley.com

Mendeley Desktop
The desktop client provided by Mendeley. It is a social reference manager and document management tool. It is the best tool to manage and share documents.

Mendeley Web
Online component of the Mendeley product. It provides an interface for (1) accessing documents stored in Mendeley Desktop, (2) accessing additional content on Mendeley’s public database of research and (3) social and professional networking.
Mendeley End User Product (also referred to as ‘Mendeley’)
The work flow and collaboration tool built for the individual researcher. It includes both the Mendeley Desktop and Mendeley Web components. This product comes as a free version with options to pay for additions to the base product in the form of premium plans. It is a separate from the Mendeley Institutional Edition.

Mendeley Institutional Edition, Powered by SWETS (MIE)
This is a module built on top of the Mendeley End User Product, aimed at librarians who are interested in analytical insights into the research that is going on in their institutions. As part of the institutional edition, Mendeley also provides premium plan upgrades to all members who have opted in to join the institutional group.

Mendeley Institutional Group
This is the primary concept within the MIE. Each MIE licence comes with an MIE group. The librarian can then invite researchers inside their institution to join the group. Each invitee must explicitly accept their invitation to become a member of the group. MIE analytics is then calculated based on who are in the group.

MIE Dashboard
This is the analytics view which is part of the MIE. It can be accessed only by an owner or an admin of the MIE group.

Premium Plans
Premium Plans provide additional personal and collaborative web space to paying individuals. E.g. a plan may allow a user to upload more pdfs, or to create more private groups inside Mendeley.

Publications
In Mendeley, a user can indicate that he or she is the author of a particular article. The user does so by adding the article to the ‘My Publications’ folder in their ‘My Library’ inside Mendeley desktop. These publications are then indexed to the user’s profile page on Mendeley and form the basis for the ‘Publications’ and ‘Impact’ stats on the MIE.

Reads
See ‘Readers.’

Readers
In the context of Mendeley, a Reader is a Mendeley user who has added the record of an article to his/her library within Mendeley.

User
See ‘Member.’

Word Plugin
The Word plugin connects a user’s Microsoft Word with their Mendeley library to offer citation generation capability.
Overview

Assuming you are already logged into the Mendeley website, when you browse to your MIE group, you will see four tabs: Overview, Members, Settings and Analytics:

Overview is the front page of your group. It provides some basic public information about the group, which you can edit later on. It also showcases members in the group with the most publications, etc.

Members is a public listing of all the current members of the group. As the owner, you can also carry out administrative actions on individual member on this page.

Settings is only available to the group owner. This section allows the group owner to edit general group details, to invite / bulk manage members, to upload holding file and also to manage OpenURL resolver endpoints.

Analytics is only available to the group owner as well as all group administrators. This section displays statistics on what group members are reading and publishing, how much impact their publications are having and what Mendeley groups they are interested in.
EDITING GROUP DETAILS

The MIE group page acts as a public profile of your institution on Mendeley. The group will appear whenever a Mendeley website user searches for your institution's name. It is therefore important that you provide useful public information about your institution and, in particular, information about your MIE group here.

The interface for specifying this information is very simple. Under Settings > Details:

The fields should be pretty self-explanatory. The group description and the group link currently appears in the top right hand corner of the group overview page. We recommend putting your institution's public website as the group weblink.

Exercise:

Try editing the different fields and see how the overview page of your group changes.
Inviting members

Note: If your MIE group has the member opt-in feature enabled, and you would not want to explicitly invite members to join the group, you can skip to the next section: Opt-in possibilities

Researchers in your institution can become members of your MIE group by accepting e-mail invitations to join the group. By joining the group, the researcher will receive an automatic Mendeley Plus or Team upgrade, depending on the plan your institution has purchased. More importantly, being a member of the group, the researcher’s Mendeley usage data will contribute to the aggregated analytics statistics that will be available to you and to the other group administrators via the Analytics tab.

Each invitation e-mail contains a unique invitation code that becomes invalidated as soon as the invitation has been accepted, which means that the invitation e-mail cannot be redistributed and reused. The invitation code is, however, not tied to a particular e-mail address. Hence, an invitee can choose to accept the invitation with a different e-mail account to the invitation e-mail address. For example, they may choose to do so if they already have an existing Mendeley account associated with their own personal (non-institution) e-mail address.

There are currently two ways to invite members via e-mails, either by typing in the e-mails one by one, or by uploading a csv file of e-mails and names. Under Settings > Members:

Default invitation text will be included in the invitation e-mail unless a custom version has been specified via the “Edit message” option, which is available under both invitation methods.
If the invitee already has a Mendeley account, the invitee will be asked to log in upon accepting invitation. Otherwise, they will be taken through the Mendeley website sign-up process, and they will be added to the group automatically after successfully signing up.

It is worth noting that the invitation e-mail will be sent to the invitee as soon as “invite” is clicked if you choose to “invite members one by one”. On the other hand, if you choose to “bulk upload members”, you will be presented with a second screen where you can concern your action.

Re-inviting users is easy. You simply have to type in, or re-upload, the same e-mails.

**Exercise:**

Create a few test e-mail addresses, and send invitation e-mails. Remember to log out of the Mendeley website before accepting each invitation. New members should appear on the Members page.
Opt-in possibilities
Researchers also have the possibility to opt-in to your institutional group, minimizing the number of email invitations you need to distribute.

If you group has this feature enabled, you will find the **Share this group via a broadcast link** section under **Settings > Members**. You can either create a standard link or one with an additional tracking name. With a tracking name, Mendeley can monitor the performance of a campaign and report the information back to you. Please do not include spaces in the tracking name.

You can then distribute that link via emails, your internal messaging systems, websites, social networks, etc. Following the link, users can click on the "Join this group" button on the group page, from which they will be prompted, through a pop-up window, to input their institutional email address.

Mendeley will send the user a verification email, containing a link. Clicking on the link (thereby verifying that he/she is affiliated with your institutional account) will assign the user to your group.

To enable **Opt-in**, please confirm with SWETS your institution's e-mail domains.
Promoting member to group admin

While an MIE group can only have one group owner, there can be multiple group admins. In the current version of MIE, the only extra privilege that a group admin has over group members is the ability to view group Analytics.

To promote an existing member to become a group admin, go to Members, either browse through the member list or use the search box to find the relevant member, and then select the "Make admin" option under the dropdown tool:

To demote an admin to become a normal member, go through the same steps but select the “Make member” option instead.

Promoting admin to group owner

The steps involved are very similar to those in promoting member to group admin. Simply go to Members, either browse through the member list or use the search box to find the relevant group admin, and then select the “Transfer group ownership” option under the dropdown tool to transfer ownership of the group from yourself to someone else.
Removing group members

Removing a member from a group will remove the member’s usage data from historical aggregated analytics statistics as well as all future statistics. The member’s Mendeley premium package, granted to them when they joined the group, will also be automatically removed.

There are currently two ways to remove group members, either by removing them one by one on the Members page:

Or you can batch remove members whom you have explicitly invited previously by going to Settings > Members, where you will be able to upload a csv of the e-mails of the members you would like to remove. In other words, this is the reverse of the Inviting Members process.

Unlike “Bulk invite members”, the upload tool here expects a csv with only one column:

Points to note regarding the “Bulk remove members” feature:

• Within the “Bulk remove members” csv, if an e-mail has been invited, but the invitation has not been accepted, the invitation itself will be revoked.

• The system keeps a record of the original invitation e-mail address for each group member. This means even if the invitee has accepted the invitation using a different e-mail account to the origin invitation e-mail address, the system can still associate the invitation e-mails you have supplied in the “Bulk remove members” csv with the correct user accounts and remove the appropriate group members.

• The system will prevent accidental removal of group owner from the group.
Uploading Journal Holdings

MIE allows the uploading of your institution’s journal subscription holdings data so that they can be used in Analytics to show the access levels of the different journals from the aggregated analytics statistics. This will provide an at-a-glance overall of whether your institution’s current journal subscription is meeting your institution’s researchers’ needs.

A few points to note regarding holdings uploading:

• It is not compulsory to upload the holdings data. Of course, without the holdings data, MIE will not be able to give you the journal access-level insights as detailed above.
• The tool expects a single csv upload containing four columns title, issn, eissn and access.
• Each entry in the csv represents a journal.
• Entries in the csv do not have to contain all four values (e.g. unknown title can be left as an empty string), but each entry is expected to have at least a non-empty issn or a non-empty eissn.
• Access is a free-text string (up to 15 characters). You can, for example, introduce access levels “full text”, “abstract”, “none” to represent different access levels of the journals in your institution. You can have as many different levels as you want.
• Uploading the csv will replace the current list. Data will be updated as soon as you click the “upload” button.
• It is recommended that you should download the current uploaded holdings data before uploading a new csv.

Exercise:
Create holding csv files containing journals data including different access levels: “full text”, “access”, “none”, and see how the journal counts under Group Holdings update with different uploads.
Adding OpenURL resolver endpoints

Adding OpenURL resolvers to the MIE group will automatically make them available on Mendeley paper pages to all the group members. This will allow group members to search / browse the Mendeley paper catalog and gain access to restricted contents:

Go to Settings > OpenURL Resolvers to add and maintain your institution's OpenURL resolver endpoints. There is currently no limits on the number of endpoints you can add:

Exercise:

Add your institution’s OpenURL resolver endpoints and visit any pages under http://www.mendeley.com/research-papers/ to see them being added to the “Find this paper at:” dropdown. You will see them if you are logged in as any member of the group.
**Viewing analytics**

Under Analytics, you will see that there are four categories: **Reading**, **Publishing**, **Impact** and **Social**.

With a brand new group, no analytics data will be available until a few days (up to a week) after members with usage data have joined the group. Furthermore, to ensure absolute user privacy, we have put in place a privacy filter so that MIE hides the metadata of papers and journals for discipline with less than 5 members. (This feature has been lifted for “trial” groups)

Most of the analytics data available can be broken down by disciplines. As shown in the image underneath, the bracketed figure next to each discipline’s name is the number of members in that particular discipline inside the MIE group:

**Reading**
Here you will find the aggregated statistics of what is in all group members’ Mendeley libraries. It shows the reading activity level against a timeline - based on when the papers were added to their libraries. It also displays the most read journals (with access level information - see Uploading journal holdings) and papers during the timeframe.

**Publishing**
Mendeley users can add their own papers to their “My Publications” folder inside Mendeley Desktop.

Here you will find the aggregated statistics of what the group members have added to their “My Publications”. It shows the publishing activity level against a timeline - based on when the papers were added to their “My Publications”. It also displays the most popular journals the members have published in (with access level information - see Uploading journal holdings) and also members with the most publications during the timeframe.
Impact
Mendeley looks at what is in every user’s libraries to calculate readership statistics for individual papers. This form of readership statistics can be used to complement traditional impact metrics such as citation counts. In many ways, they provide faster and more direct measures of impact.

Here you will find the readership statistics across the whole of Mendeley for the papers in the group members’ “My Publications”. It shows the aggregated readership counts against a timeline - based on when the papers were added to their “My Publications”. It also displays the most read papers the members have published and also members with the most read publications during the timeframe.

Social
Here you will see which other Mendeley groups the group members have joined.
Comparing Journals

Under Analytics > Reading and Analytics > Publishing, it is possible to compare the popularity of multiple journals side-by-side. You can either type in the journal names in the Compare textbox to reveal a dropdown of the matching journals to select the ones to compare, or just click the “Showing on graph” checkboxes under Top journals to the right:

To remove a journal from the comparison, just click the dismiss boxes above the graph:

Downloading tabular data in CSV format
All the tabular data in the Analytics section are available for download in CSV format via the “Download as CSV” link at the bottom of each table. Only the top 1000 entries are available for download.